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IN OUR COMING ISSUES

In May, the traditional tourism season is getting underway. Sport fishing is an incredibly popular pastime, and it's not just trophy anglers, but Granddad and the kids too who will travel long distances to visit new lakeside resorts or campgrounds. Where to stay in Canada is never a challenge, with so many soft pillows in so many rooms ranging from cottage inns to 5-star hotels. At Issue will look at the Kyoto Accord, and how Canada's commitment will affect the industry. We'll also take a peek at how the tourism industry is adjusting to climate change itself.

In June, the summer tourist season is almost upon us. The Canadian Tourism Commission (CTC) has a new marketing committee focusing on niche products; we'll find out where that strategy is headed. And, it is the seventh anniversary of the CTC Product Clubs program, an initiative that has, incidentally, generated its share of new niche products! At Issue will look at ecotourism. Deadline: April 25, 2003.

Month	Deadline	Features
July/August 2003	May 23, 2003	Experience SUMMER in Canada Exploring a new market: youth
September 2003	July 25, 2003	CHOICES: eating well in Canada Canada, a stage for learning
October 2003	August 29, 2003	Experience AUTUMN in Canada Discovering Canada through its museums
November 2003	September 26, 2003	CHOICES: new things to do in Canada Revamping Canada's attractions
December 2003	October 24, 2003	Experience WINTER in Canada Canada, a multicultural society

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New CTC publications

- (TAMS) - Canada's Visual Arts Tourism Enthusiasts (C50159E)
- (TAMS) - U.S. Visual Arts Tourism Enthusiasts (C50161E)
- (TAMS) Activity-based Tourism Segments in Canada and the U.S.: An Overview (C50173E)
- Japan Advertising Tracking Study - 2001-2002 (C5069E)
- Corporate Plan Summary 2003-2007 (C50172E)
- Canadian Tourism Commission - 2002 Annual Report

These publications are available through distribution@ctc-cct.ca or at www.canadatourism.com.

TOURISM

CANADA'S TOURISM MONTHLY

April 2003, Volume 7, Issue 3
ISSN 1499-5719

TOURISM is published by the Canadian Tourism Commission in cooperation with the Canadian tourism industry.

The Canadian Tourism Industry

Vision: Canada will be the premier four-season destination to connect with nature and to experience diverse cultures and communities.

Mission: Canada's tourism industry will deliver world-class cultural and leisure experiences year round, while preserving and sharing Canada's clean, safe and natural environments. The industry will be guided by the values of respect, integrity and empathy.

www.travelcanada.ca
[www.canadatourism.com \(CTX\)](http://www.canadatourism.com)

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Fax: 613-946-2843

■ **Canadian publications mail product sales agreement number 40659111**

The views and opinions expressed in TOURISM are those of the authors and not necessarily those of TOURISM or the Canadian Tourism Commission.

■ **Votre copie française de TOURISME est disponible en composant le : 613-954-3884**

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On the cover: In spring, all across Canada, something unique is happening.
Photo: courtesy of © Louise Tanguay, Imagination Photo Services.



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Editorial

Does spring belong to the city? by Peter Kingsmill

A neighbour used to say, "Canada, she is *winter* country, boy!" After a January, February and March like we have just had, it would be hard to argue with the old fellow... it surely has been "winter country" across most of our home and native land!

Arriving at spring, as an industry, we arrive with mixed emotions. Winter may be maintenance and marketing time for our summer properties like parks, lakeside resorts, and golf courses, but it is all about sales and revenue and fiscal survival at our ski hills and winter resorts.

Indeed, spring is an in-between time for most of Canada's outdoor-based tourism products. To be sure, it is satisfying to walk in the country, listen to the creeks babbling under that special warm spring sunshine, or ski in a T-shirt on corn snow at our mountain resorts. However, these are fleeting moments, and hard to package and sell... you just gotta be there! Flower-watching in Victoria, B.C. and iceberg encounters in Newfoundland and Labrador are important niche products, to be sure, but they are incredibly weather-sensitive.

Perhaps, then, it is in our cities where the opportunities to sell spring are most apparent. Our cities seem especially warm and vibrant in spring, with the bustle of downtown nightlife juxtaposed to city parks in bloom. Hotels are busy with spring conventions and on the weekends – imagine it – hockey playoffs and tournaments. Spring is also student field trip time, as teachers and youngsters alike have had just about enough classroom time and are yearning to get back outside. For our attractions and museums, student field trips are like a profitable shake-down cruise before the summer season!

In this issue, our contributing editor Will McClelland takes a look at how our industry deals with spring. Guest writer Gregory Higgins takes a look at our capital cities, examining what is unique – and similar – about them.

Being a four-season destination can be difficult. Some marketers say they don't have enough money to "do" spring; many operators are unwilling to invest the required capital to gear up for off-season specialties. But in the city, maybe spring just comes naturally! 

Peter Kingsmill, Editor-in-Chief



Sandra Hardy has been appointed as the public sector representative for the Manitoba and Saskatchewan region on the CTC Board of Directors. Hardy is Deputy Minister of Culture, Heritage and Tourism for Manitoba, and has been with that department since 1982. www.canadatourism.com.



More international overnight visitors came to Canada in January 2003 than in any other January since 1990. Seasonally unadjusted international overnight travel numbers to Canada increased by 7.8 percent in January 2003, compared to the same month of the previous year. January marks the fourth consecutive month with positive figures. www.canadatourism.com.



The Canadian Tourism Commission and the World Tourism Organization Business Council have released a joint study on "Public-Private Sector Cooperation and Private Partnerships in Tourism" providing guidance on how to build and implement partnerships. www.world-tourism.org.



"...any war involving our closest neighbour and primary travel market will be bad news for Canadian tourism while it lasts, and for some time after," says Tourism Industry Association of Canada chairman **Peter Elmhirst**. "(However) Canada remains a safe and secure destination for international travellers," he adds. www.tiac-aite.ca.



Canadian Tourism Commission chairman Charles Lapointe calls tourism a major pillar for socio-economic growth for Montreal in a speech to that city's Chamber of Commerce. The text is available at www.tourism-montreal.org.



Hosting one of Toronto's top four tourism events, the International Film Festival Group pumped \$67-million into the economy in 2002, more than double the nearly \$30-million the organization generated in 1993. www.e.bell.ca/filmfest.

Letters to the Editor

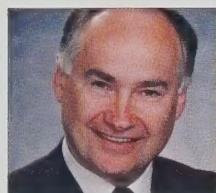
Our compliments on *TOURISM* (*Canada's Tourism Monthly*) magazine. We find it full of useful information at our office. The magazine offers a quick and easy forum for obtaining perspectives on the tourism industry within Canada - thanks.

I am particularly interested in the upcoming May issue, in which you say you will be featuring "Fishing Canadian Waters". I do hope the Northwest Territories can receive some coverage; we are confident that the NWT offers one of the best fishing destinations

in the world. Please discuss this with us. Thank you - and best wishes for 2003! 

*Brian Desjardins
Yellowknife, NT*

We encourage our readers to submit letters on any topic or issue covered in *TOURISM* magazine. Please include your full name, address, and telephone number. The editorial board reserves the right to select and edit letters for publication.



At Issue

by Randy Williams

Highway system needs leadership

The growing challenges of air travel mean more Americans are choosing to visit Canada by car, as a matter of convenience and cost. In 2002, almost 33 and a half million U.S. tourists entered Canada by automobile. The number whose visit included at least one overnight stay – over 10 and a half million people – was up 7.3 percent from 2001.

Apart from the smiling face of a Canada Customs officer, the first exposure many of these visitors to Canada have is our national highway system. And chances are they will use part of that system to get around once they are here. It comprises 25,000 kilometres of important interprovincial and international linkages whose backbone is the 7,821-kilometre Trans-Canada Highway, connecting several provincial highways from British Columbia to Newfoundland.

Unfortunately, the impression our national highway system gives visitors to Canada is not likely to be a positive one. Funding of this important transportation network has not nearly kept pace with population growth, urbanization and increases in vehicle travel since the Trans-Canada was completed in 1970. The unhappy results are slowdowns, congestion and uncomfortable rides; the tragic results are accidents, injuries and deaths.

Federal reports indicate that 38 percent of Canada's national highway system is substandard, requiring a variety of repairs and upgrades. Five years ago, the Council of Ministers Responsible for Transportation and Highway Safety pegged the cost of correcting current deficiencies at \$17.4 billion (1997 dollars). The benefits of making those needed repairs and upgrades include: improved safety and efficiency yielding reduced travel times, lower vehicle operating costs, fewer injuries and fatalities, less fuel consumption and lower greenhouse gas emissions; the expansion of economic development, tourism and trade; and an overall increase in economic competitiveness and productivity.

While various federal infrastructure programs were announced in recent years, the money available for our national highways will only go so far. The Tourism Industry Association of Canada – along with groups representing the full range of economic sectors – is calling for a long-term funding solution. We want to see a federal-provincial/territorial National Transportation Investment Strategy that reinvests some of the funds collected from road user taxes. The federal government alone currently collects more than \$6 billion annually in fuel, excise and other taxes, but returns less than 6 percent (about \$200 million) to the system through construction and maintenance projects.

Instead, in a move reminiscent of the Air Travellers Security Charge, Ottawa appears to be looking at charging highway travellers additional user fees. In its recently released vision for transportation, *Straight Ahead*, the government says it will explore with the provinces and territories "new governance models – such as the introduction of transportation authorities and the possibility of earning user revenue for infrastructure." It further defends its longstanding failure to spend fuel taxes on roads, claiming "federal fuel taxes are an instrument of fiscal policy, not transportation policy."

While mindful of jurisdictional issues, we believe Ottawa should take a meaningful leadership role in upgrading Canada's national highway system – an initiative that will benefit all Canadians and the economy as a whole. *

A new federal vision for transportation

In February, Canada's federal Transport Minister released a document entitled *Straight Ahead - A Vision for Transportation in Canada*. The Transport Minister has stated that the transportation system of tomorrow should remain largely market driven, with government setting a competitive framework and intervening only as a last resort. While much of the vision document concerned the government's plans for air, rail, and marine transportation, roads and highways were also covered to some degree. Here are some points that will be relevant to federal involvement with roads and highways:

- When it comes to road pricing, "the government recognizes the challenges associated with jurisdictional and funding issues." Transport Canada "intends to explore with provincial and territorial governments the implications of possible new governance and investment models for road transportation and urban transit."
- The government plans to place a high priority on trade and passenger corridors "such as the national highway system (and) federal roads and bridges" when making strategic investments.
- Transport Canada will look to "increase its understanding of the full cost implications of, and better pricing signals for, the use of different modes of transportation."
- Transport Canada will "specifically incorporate environmental responsibility as a fundamental principle in the National Transportation Policy set out in the *Canada Transportation Act*." *

The document may be viewed in its entirety at www.tc.gc.ca.



Keeping the tourism industry on course.

The Tourism Industry Association of Canada is the national voice of the tourism sector and the source of information and development for tourism professionals from coast to coast. If you and your business are part of this vital and thriving industry, join us, let your voice be heard, and benefit from our innovative member programs and events.

Visit online for more information at www.tiac-aitc.ca

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Partnership model working well

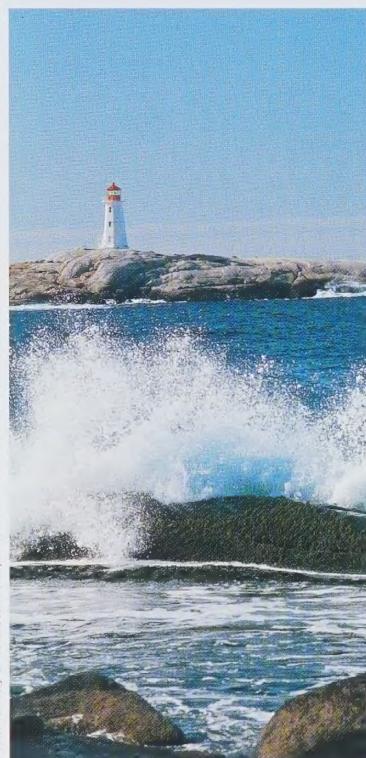


Photo: courtesy of Nova Scotia's Department of Tourism and Culture.

Nova Scotia: Canada's Seacoast.

Since its creation in 1997, the Nova Scotia Tourism Partnership Council (NSTPC) has enabled industry to have direct input into how the province markets itself to the rest of Canada and the world.

While the province continues to be responsible for tourism within government under Minister Rodney MacDonald of the Nova Scotia's department of Tourism and Culture, the NSTPC enjoys a prominent place in the decision-making process.

"When it comes to tourism strategy, the NSTPC members are essentially the board of directors of the department," explains Paul Stackhouse, Chair of the NSTPC. "It's joint decision-making. We're all in the same boat and the boat is the strategic plan."

Composed of two government representatives and 14 industry leaders – seven selected from the membership at large and another seven selected on a geographic basis to ensure a balanced representation – the NSTPC has four committees and two task forces and meets every month to six weeks with the provincial department. All programming and planning must be approved by the minister.

"Weekly the department is in-touch with some or all of the NSTPC committees," says Stackhouse. "There's no gap. Everybody's sitting at the table when the decisions are made."

Of the province's total marketing budget of approximately \$13.5 million, roughly \$5.3 million comes from media buy-ins. "In 2001, 52 cents came in from other partners for every dollar we spent in marketing programs," says Rick Young, director of sales and partnerships with the department. "In terms of product development, for every dollar the province spends other industry and community-based groups contribute \$5.50."

The NSTPC has developed a *Vision for Revenue Growth over the Next Ten Years* that has already been adopted by the department, the NSTPC and the provincial association and is just a first step toward the lofty goal of 100 percent revenue growth over the next decade.

Nova Scotia has long been the home of a robust and co-operative tourism industry. Formed in 1977, the Tourism Industry Association of Nova Scotia (TIANS) – which is still highly active today – was the organization through which the NSTPC was created. As a project-oriented organization belonging to the private sector, TIANS undertakes for a fee various projects, under sponsorship and service agreements. "For example, the province contributes roughly \$85,000 to the Human Resource Council (HRC) program implemented by TIANS," says Young.

TIANS' main source of revenue comes from its 110 members and the annual conference, which is the largest in Canada. "The Nova Scotia department works closely with TIANS in other areas such as the annual tourism conference in November under the Destination Marketing Program," says Young.

TIANS' board of directors meets eight times a year, holds two general meetings annually and consists of six officers, ten active directors, 4 allied directors, 2 affiliate directors

and enjoys the support of six strategic alliances. Nova Scotia also boasts eight regional tourism industry associations (RTIA's) and several sector organizations. The staff of the RTIA's and TIANS meet monthly, as do the subsidiary bodies of the NSTPC.

"The model of the NSTPC certainly, by all accounts, is working well," says Stackhouse. "Based on the success of the tourism partnership council, other departments in the province are considering adopting the same type of model to work with industry." 

Developing human resources

According to the World Travel and Tourism Council (WTTC) and a growing number of industry analysts, human resources (HR) is fast becoming the single most critical issue facing the travel and tourism industry for the next ten years. Fortunately, Canada is heeding the call!

"An attitude of valuing and investing in employees is sweeping the country," says Jon Kiely, director of communications with the Canadian Tourism Human Resource Council (CTHRC). "But, every province has a slightly different approach. Quebec, for example, likes to reward at the property level, while Manitoba has an open house to show the industry what they do."

Nova Scotia's CTHRC counterpart, the Tourism Industry Association of Nova Scotia Human Resource Council (TIANS HRC) has been especially active, participating in a variety of issues ranging from occupational health and safety awareness to labour code and wage concerns. TIANS HRC has focused heavily upon employee "credentialing", the promotion of career awareness in high schools, post-secondary courses related to tourism, and employee recognition.

"It has been an exciting decade for the TIANS HRC," says Darlene Grant Fiander, director of TIANS HRC. "Given the critical role that they play in the economy, attracting and encouraging the training of tourism employees is a top priority."

"They (TIANS HRC) have been very good at getting industry to rally around its human resources," says Kiely. "Every year they have a recognition dinner. They make the people who they recognize feel good about what they're doing."

A similar approach to human resources has been adopted in Saskatchewan. "It's a question of offering career path opportunities and a recognition of achievement," says Carol Lumb, director of tourism education and training with Tourism Saskatchewan. "We're looking at more than pay. We have many great career opportunities."

In addition to an annual recognition dinner held in honour of that year's nationally certified tourism professionals, Tourism Saskatchewan also recognizes employers who are committed to training with a property recognition breakfast. "In order to maintain their certification," says Lumb, "60 percent (of all their employees) must be certified and at least 80 percent enrolled in the process. HR development is different in tourism," adds Lumb. "It's been under recognized until the last few years. Now it's building." 

For more information: www.cthrc.ca.



Storefront

Changing times, breaking barriers

by Marc-André Charlebois

With a war in Iraq, one cannot help but think about the threats to the tourism and travel industry worldwide. I am not an eternal optimist (my friends and colleagues can attest to that) but I definitely see a bright side to these otherwise tragic circumstances.

Polls on travel and holiday intentions are consistently showing a trend towards shorter more "experiential" holidays closer to home. With the huge American market just south of the border, and our own very special tourism and travel market, isn't this a strong opportunity for a country like Canada, whose cultural diversity, geography and climate make it the ideal destination in such circumstances? I think so, and more and more travel agencies are beginning to think this way.

But the challenge to attract inbound clients is substantial for both tourism operators and travel retailers alike. Traditionally, these groups have not developed synergies to appeal to this client base. Travel retailers had more incentives to send Canadians to foreign destinations. There was a clear pattern in Canadians' travel preferences: sun destinations in the winter and European or more exotic holidays in the summer.

As stated above, these trends are evolving, in large measure due to economic circumstances and security issues. And the airlines are no longer paying substantial base commissions to travel agencies. Of course, there has always been a strong inbound market and Canada has long been on the map as a tourist destination. But the marketing infrastructure has been promoting the larger operations and the traditional "magnet" destinations, as opposed to the smaller, lesser known, but sometimes amazing, "nooks and crannies" that dot our country.

One cannot blame travel retailers alone for the existence of these two solitudes. Tourism professionals, some 147,000 of them being small and medium size operators, have not always had the business acumen or the wherewithal to grow their business in new directions. Nor have they had the access to markets required to create and sustain growth. There were problems with quality, with the products not always at the level expected by demanding tourists. There were issues with pricing and fee settlement, which made relationships between supplier and retailer difficult at best, and impossible most of the time.

But these conditions are gradually changing as a result of market development initiatives, the Web and e-business solutions. Programs like the Product Clubs under CTC leadership have proven very successful in improving the business practices of small and medium size tourism entrepreneurs. Necessity has forced many travel retailers to reinvent their business and look at other income streams. The travel retail industry is also consolidating, with some of the smaller travel operators (whose business model was designed during the good and easy times) already being driven out of business or absorbed by better managed business concerns.

These transformations are slowly starting to bear fruit. Barriers between the solitudes are coming down because of a willingness to co-operate and learn from one another. Experience and skills from two very distinct but close professions have the potential to produce exciting results. Who knows what the future holds for this fascinating business of ours. And for that, I cannot help but be optimistic in these changing but stimulating times. 

Enhancing corporate and incentive travel

Interpretive guided tours, artisan demonstrations and interactive experiences create hands-on, mind-on experiences that the business and corporate travel market is seeking. "Both domestic and international corporate and incentive travellers are looking for authentic experiences during their stay," says Cathy Holler, Managing Director of the Learning & Enrichment Travel Alliance.

The Alliance is an on-line directory that promotes the diverse themed experiences across Canada under the umbrella of travel "experiences". Searchable on-line directories represent providers at both a corporate and product level under specific themes. The MC & IT market is starting to recognize the value in using these on-line product clusters as a resource for program development and event enhancement.

Earth Rhythms, in Manitoba, features programs that are specifically geared to the corporate travel market. Earth Rhythms' Team Learning Adventures are "experiential activities selected to achieve specific types of outcomes or objectives," says owner Celes Davar.

Kevin Hicks, owner of The KMH Group Inc., works directly with small and medium-size businesses by creating corporate or incentive packages that are theme based. "We offer team building activities and corporate excursions based on Theatre, Music, Canadian Culture and the Performing Arts," says Hicks. "The idea is to engage, entertain and educate participants so they receive a standing ovation for a job well done when the group returns home!" The KMH Group also works with local destination marketing companies by providing

add-ons and product development ideas for large-scale events and conventions.

At Vancouver's Capilano Suspension Bridge, a group is offering unique First Nations experiences to local destination marketing companies. "We offer interactive activities where the guests get to not only watch a dance performance, but they also get to learn the moves and corresponding chants alongside the performers" says Brett Calder, responsible for events and group sales. 

For more information:
www.letacanada.com or
Michelle Neilson at 604-681-2199.

Photo: courtesy of the Capilano Suspension bridge.



First Nations artisan, Wayne Carlick, Tlingit Master Carver. Interactive experiences are what the corporate travel market is looking for.



Spring blossom market grows in Japan

Blossom time in B.C. was introduced into the Japanese market about 6 years ago, when the Canadian Tourism Commission (CTC) worked with travel agents in Japan to promote flower-viewing programs that are now a popular spring product. Last year 65,000 Japanese visited B.C. from March to May, according to statistics from Tourism B.C.

In Eastern Canada, the CTC, together with JTB Group Tours Tokyo office, is promoting special seven-day

packages to Toronto, Ottawa (Tulip Festival) and Niagara for May 2003. This project is tied in with "Shumi no Engei" (a leading Japanese gardening magazine) and other partners. Promotors anticipate some 80 sales in the first year. *

For more information: hando.masayo@ctc-cct.ca.

German market edging up

by Karl-Heinz Limberg

Despite tough times for the German economy, 2003 looks like a pretty good year for tourism to Canada. Plans for trips to North American destinations had been postponed from the past two years, mostly because of strong currencies on this continent. Tour operators have reported healthy bookings for January and early February and Canada should regain some lost ground as long as the global political situation doesn't worsen.

German consumers are very interested in safe, clean environments with multi-purpose products

and Canada perfectly matches these current needs. This was very evident at the recent ITB show where we noted a strong interest in Canada, despite the many challenges we are currently facing. ITB, the world's largest tourism trade show, took place from March 7-11 with more than 180 countries, over 10,000 trade exhibitors and more than 90,000 visitors (mainly trade). Canada's presence included 47 exhibitors under the CTC umbrella. *

For more information: limberg.karl-heinz@ctc-cct.ca.

TravelCanada.ca reaches Mexico

A Spanish version of the Travel Canada Web site for the Mexican market has been completed and is up and running. The new site is similar to other versions of Travel Canada, but several new components were added in order to customize the content for the Mexican market. A tour operators' search tool, sections on shopping and national parks for each province, as well as a value proposition for visiting Canada are among the new features. (Visit www.travelcanada.ca and click on the Mexico flag.)

The number of visits to Travel Canada continues to grow on a monthly basis. During the past three months, the number of visits has gone up 53 percent, increasing 170 percent over the last 12 months. *TravelCanada.ca* now reaches eight markets and is available in four different languages (French, English, German and Spanish). The next version to be launched will be for Hong Kong in April. *

For more information: pichette.patrick@ctc-cct.ca.

Roadshow coming your way

The Canadian Tourism Commission's (CTC) Roadshow will be held across Canada beginning April 22 and continuing through May 16. The Roadshow has been moved forward so that businesses in the tourism industry are more able to attend and use CTC information in development of their marketing plans for next year.

"With world events and the travel industry in so much flux it is even more critical for the CTC to work closely with the industry and partners," says CTC vice-president

for marketing Patrick Gedge. "The Roadshow not only allows the CTC to share up-to-date information but as importantly, it provides a venue for the CTC to listen and learn what is happening throughout the industry, especially among the small and medium-size enterprises that are key to future tourism growth." *

For further details and registration: www.canadatourism.com/roadshow.

Untangle the Web

by Greg Klassen

My Destination Marketing Organization (DMO) is promoting an e-commerce system for use by its members to provide on-line booking and payment for our clientele. However, my property is very small (we do about \$100,000 per year) and many of our clientele – perhaps 65 percent – while technically tourists, are regional or nearby. In your view, is it worth my while investing time, energy, and money in an e-commerce project?

The folks at your local DMO obviously understand the power of this media and the power of partnership marketing. By collectively including tourism inventory and a booking tool on their site, they are developing a compelling tool to help prospective customers find their destination and your property, at a significantly lower cost than you could do it yourself. Even if the majority of your customers are nearby, more and more of these travellers are looking to these types of sites to help them find local travel packages that meet their needs.

Before jumping on board, ask to see the DMO's marketing plan and how it plans to bring in visitors to the site. For this e-commerce site to be valuable, it must attract visitors, engage them and compel them to visit your destination. Then it's up to you to differentiate your property from your competition on the site, through a variety of tools available in the marketing mix: price, service offerings, location, packages, or simply a good promotion. *

We welcome our readers' questions on managing their tourism Web sites. Please e-mail them to tourism@ctc-cct.ca.

Newfoundland: a cross-road of attractions

Newfoundland is quickly gaining a reputation as Canada's fastest growing tourist destination and according to Kevin J. Wright, product manager with Globus North America, it's small wonder.

"Newfoundland has become one of our best-selling destinations in recent years," says Wright. "People are looking for more exotic destinations, places they have never been to. Many are fascinated by Newfoundland, as they know little about it. There are bragging rights that come with having visited."

Charlotte Jewczyk, manager of market development, travel trade, with Newfoundland Tourism, concurs. "In today's market place, off-the-beaten-path locations have a huge appeal. That's indicative of a global trend." In addition to its "exotic" appeal, Newfoundland has also benefited since September 11, 2001, from peaked interest in safe destinations and places of solitude. "We have a great product

mix here," says Jewczyk. "Good for mind, body and soul."

The recent availability of chartered flights to and within Newfoundland is also contributing to the prosperity of the province's tourism industry. "As one of our big trends in the industry is passengers wanting shorter tours," explains Wright, "I was informed that if we took advantage of the chartered flights that operate in Newfoundland we could make ours a "Newfoundland only" tour, and thus shorten the tour by a couple of days by not having to begin in Nova Scotia. We've been able to increase the quality of the tour by allowing it a more leisurely pace."

By visiting with suppliers and vendors throughout his trip to Newfoundland, Wright was able to discuss quality issues which, in turn, help to solve any problems either he or the Newfoundland industry might meet. "It (the trip) will help us to create a tour for



The east coast of Newfoundland and Labrador is where icebergs and whales meet in late spring and early summer. We apologize for incorrectly using and crediting this photo on page 11 of the January-February issue of *TOURISM*. The photo is the property of the Department of Tourism, Culture & Recreation, Newfoundland and Labrador.

2004 that should increase not only our sales but our quality as well," says Wright. 

For more information:
www.globusjourneys.com.

Partner power by Bryan Mercer

In a public sector effort to become more entrepreneurial, Fort Henry National Historic Site at Kingston has developed a partnership program that's working – and continues to gain speed each year.

Since the inception of Fort Henry's dedicated partnership and sponsorship program, it has earned in excess of \$2.2 million in cash and in-kind sponsorships, as well as thousands of dollars of value in free publicity through various publications and electronic media in Canada and around the world. Marrying a nationally significant heritage resource with modern day products and promotions takes careful planning, matching site and partner needs in a way that's unobtrusive, yet with the ability to deliver public exposure or transactions back to each partner.

Some examples: Hershey Canada supplies the Fort with snack-sized Oh Henry Chocolate Bars for distribution at the admissions gate – enough to cover the over 160,000 annual visitors. Rogers AT&T Wireless offers cell phones and Via Rail offers free train passes in an effort to create awareness of Fort Henry's popular Sunset Ceremony evening performances, and the Radisson Hotel and Days Inn have financially supported the Sunset Ceremonies as lead sponsor since 1998.

The list goes on, but you won't see any advertising banners, snazzy billboards or neon signs inside Fort Henry. Once you pass through the 14-foot archway flanked by Fort Henry Guards in scarlet uniforms, any semblance of modern day accoutrements soon vanish. What remains is Fort Henry's ability to triple its modest annual marketing budget through creative partnership and sponsorship initiatives, all in the name of preserving and promoting history. Sometimes it's the most seemingly mismatched bedfellows that become the most compatible. 

Bryan Mercer is responsible for marketing and partnership development at Fort Henry: Bryan.Mercer@forthehenry.com

Writers wowed by winter

Having clients finish their tour with a sense of value well-received, and even that special "wow" factor, is every tourism operator's dream. Six travel writers from across Canada felt just that way after taking part in the "Winter in the Whiteshell" media tour held in the third week of February and co-hosted by the Canadian Tourism Commission's (CTC) Guy Desaulniers and Travel Manitoba Travel Marketing Coordinator Cathie Senecal.

Ruth Marr, owner of Randonnée Tours, was the architect of this wonderfully crafted occasion. After organizing self-guided tours in Europe for North American travellers for 12 years, Marr has turned her attention to developing Manitoba's four-season potential for domestic and international tourists since 2001. Her efforts have proven worthwhile: in its first year, the Whiteshell package (which garnered second place in the CTC's 2002 Nature in Winter national contest) is already popular with Canadian and American outdoor tourists.

All participants agreed the tour is well put together to begin with. Itineraries, schedules, and comprehensive instructions on the types of activities, on how to dress, and safety tips, complete with historic details, were received well in advance. Snowshoeing, snowmobiling, curling, bareback horse riding and ice fishing, as well as cross-country skiing under sunny skies through the boreal forest, provided wonderful excuses to rally around the table to taste regional cuisine rich in multicultural traditions.

On top of the beauty of the wilderness setting, participants were struck by the friendliness of the Manitobans and especially their involvement in hosting the travellers. People from the communities along the way accompanied tourists on the trails, on the rink or by the fireside. 

For more information:
www.pinewood.mb.ca,
www.falcontrails.mb.ca,
www.festivalvoyageur.mb.ca, and www.randonneetours.com.

Product Development



SPRINGTIME IS THAT WONDERFUL, BUSY TIME OF YEAR WHEN EVERYBODY, WHETHER THEY ARE IN TOURISM OR NOT, GETS BUSY CLEANING UP FROM WINTER, PAINTING, GROWING FLOWERS, AND GENERALLY PREPARING FOR THE SUMMER.

CANADA'S CITIES, TOWNS AND VILLAGES ARE NO DIFFERENT. AND IN THE CAPITAL CITIES OF CANADA, THERE IS A SPECIAL EFFORT TO SPRUCE THINGS UP, BECAUSE OUR CAPITALS

REPRESENT ALL OF US, IN SO MANY DIFFERENT WAYS. WE ARE GRATEFUL TO THE NATIONAL CAPITAL COMMISSION FOR THE FOLLOWING GLIMPSE INTO THE NATURE OF THOSE TOURISM DESTINATIONS THAT ARE OUR CAPITALS. IT WOULD BE EXHAUSTING TO CREATE – AND READ – AN EXHAUSTIVE LIST OF WHAT'S AVAILABLE IN OUR 14 CAPITALS, BUT GREGORY HIGGINS' ARTICLE TOUCHES ON SOME OF THE HIGH POINTS. ENJOY!

Sharing the capital experience

by Gregory Higgins

When it comes to destination marketing, it's nice to have a niche to call your own. As seats of government, Canada's capitals have a lot more than just a niche — they've got an entire franchise. Their political role, combined with symbolic, ceremonial and commemorative functions, puts them in a league of their own.

Capital marketers know they've got a good thing, but they're not about to rest on their laurels. In fact, they're working harder than ever to broaden their appeal by packaging innovative new themes and superb historical, cultural and geographic attractions to sell their cities as exciting four-season travel destinations.

Rivers, oceans, and ports

300 years of development at Fredericton is tied to the majestic St. John River, which runs through the heart of New Brunswick's capital. When Fredericton re-branded itself in 2002 it chose "Atlantic Canada's Riverfront Capital" as a theme to build on this unique setting and create a more active and "experiential" interpretation of the city for visitors.

In Manitoba's capital, The Forks National Historic Site is a green oasis in the city's heart at the

junction of the Red and Assiniboine Rivers. This 13-acre park, which features a tree-lined river walkway and spectacular vistas of Winnipeg and historic St. Boniface, is a four-season national treasure.

In Ottawa, legend has it that Queen Victoria chose Canada's new capital in 1857 after seeing a painting of the breathtaking natural scenery along the Ottawa River. Of course, strategic considerations also played a part in the decision; the city's other famous waterway, the 200-kilometre-long Rideau Canal, which meets the Ottawa River in the shadow of the Parliament Buildings, was built 25 years earlier to ensure a safe supply route between the Ottawa River and Lake Ontario in the event of war with the United States.

Capitalizing on Cultural Assets

The marketing of Halifax as an entertainment centre began in earnest five years ago when the city hosted the highly successful inaugural version of the East Coast Music Awards. Since then, Halifax's stature as an entertainment and cultural capital has expanded considerably, fueled in large part by the growth of a vibrant east-coast music scene.

Toronto's cultural scene, one of North America's most dynamic,



History comes alive in Québec City.

gets even better this May with the official opening of the *Distillery Historic District* in the south-east core of the city. The district is a stunning example of the revitalizing impact of the arts on historic architecture. With its galleries, studios, rehearsal and performance spaces, and offices for non-profit arts organizations, the *Distillery Historic District* marks the eastern terminus of Toronto's Front Street cultural corridor, which

includes the First Parliament site, St. Lawrence Market, Union Station and Fort York.

Destination Winnipeg invites visitors to "Embrace the Spirit" of the city by experiencing unique historical and cultural attractions such as the *Circle of Life Thunderbird House*, a focal point for Aboriginal art, dance, music and theatre among Winnipeg's Aboriginal population, the largest of any city in Canada.



Fredericton began as a French military encampment along the Saint John River.



Victoria: The City of Gardens.

In the city's St. Boniface area, the largest French-speaking community outside Quebec invites visitors to Fort Gibraltar on the banks of the Red River, where they can walk back 200 years in history to the time of the Voyageurs and the fur trade in the Northwest.

Northern Discoveries

Canada's northern capitals are successfully packaging their culture, climate and geography to build a unique brand of adventure tourism that draws visitors from all over the world who are eager to experience life North of 60.

With its impressive mountains, pristine lakes and magnificent Yukon River, Whitehorse has long billed itself as Canada's Wilderness Capital. It is an increasingly popular destination for European visitors looking for "hard" adventure — canoeing, camping, hiking and wildlife spotting — in the wide-open spaces of the Yukon.

Settled in 1934, after the discovery of gold on the north shore of Great Slave Lake, Yellowknife is synonymous with exploration and adventure, from the tales of the early bush pilots to current mining initiatives in Canada's 'Diamond Capital'. Tourists from every continent gather in Yellowknife from September through April for the world's best view of the Northern Lights. On June 21, the day of the summer solstice, the community celebrates National Aboriginal

Day, a statutory holiday across the Northwest Territories.

Iqaluit, Canada's smallest capital on the shores of Koojeesee Inlet at the head of Frobisher Bay, is a centre of Inuit culture and a starting point for adventure on Baffin Island or other areas of Nunavut. In summer, there's camping, hiking, fishing, whale watching and kayaking, while in winter visitors can try their hand at dog sledding, snowmobiling and ice fishing. Canada's newest capital city is the farthest north, but is surprisingly accessible to major Canadian cities thanks to excellent air links, with only a three-hour flight from Ottawa.

Capital Museums

Playing to your strength is a key to successful destination marketing, and no city does it better than Regina with the recent groundbreaking for the new RCMP National Heritage Centre. The \$25 million multi-year project will see the current RCMP Depot transformed into one of Canada's major tourist destinations, expected to draw about 250,000 visitors annually.

A recent branding initiative entitled "Victoria's Creative Season" has raised the profile of two of the B.C. capital's most popular cultural institutions, the Royal British Columbia Museum and the Art Gallery of Greater Victoria. The initiative has been successful in drawing visitors to Victoria's arts

community and cultural institutions during its October-to-March target period.

A \$250 million infusion of public funds into world class attractions such as the Royal Ontario Museum (ROM), the Art Gallery of Ontario and other top cultural venues is aimed at fuelling Toronto's renaissance as North America's cultural capital over the next three to five years.

Spirit of Celebration!

No matter what the season, the spirit of celebration is alive and well in Canada's capitals. Nature, music, culture and Canadian heritage are front and centre at festivals and special events that span the calendar. To mention just a few, Edmonton has successfully billed itself as 'Canada's Festival City' for many years thanks to a stable of 15 annual festivals and events. Québec's two newest festivals — the *International Military Music Festival* and the *New France Festival* — have been popular additions to the city's summer festival calendar. The National Capital Commission sees the hosting of the 2003 Juno Awards as an opportunity to reinforce Ottawa's cultural image.

History Comes Alive

Prince Edward Island's capital introduced "Charlottetown: An Adventure in History, Plus So Much More!", a new destination-marketing brand that builds on the city's image as the birthplace of Canada to promote its unique historical and cultural assets. The centerpiece of the city's rebranding effort is Founders' Hall, a 21,000 square-foot multimedia heritage attraction that offers a fascinating, interactive, virtual time tour of Canadian history.

Located on Charlottetown's historic waterfront, Founders' Hall is the new home to Charlottetown's Confederation Players and the starting point for discovery of Charlottetown attractions. For industry watchers, the facility is proof that a well-packaged historical adventure theme can make a quick impression on the marketplace. Founders' Hall is a big hit with the motorcoach and cruise-ship industries, which are booking longer stays around the Charlottetown discovery experience.

St. John's is using its popular City of Legends theme to market its rich mix of history and Newfoundland

To every city – a slogan!

Many cities in Canada have branded themselves with slogans designed to impress and attract; our country's capitals are no different! Here is how they are positioning themselves:

Victoria: *City of Gardens*

Edmonton: *Canada's Festival City*

Regina: *The Queen City*

Winnipeg: *Embrace the Spirit*

Toronto: *Diversity Our Strength*

Ottawa: *Canada's Capital*

Québec: *The New Capital*

Fredericton: *New Brunswick's Riverfront Capital*

Iqaluit: *Canada's Newest and Most Northern Capital City*

Halifax: *One of Canada's Great Cultural Capitals*

Whitehorse: *Our people, our strength*

Yellowknife: *Diamond Capital of North America*

Charlottetown: *Birthplace of Canada*

St. John's: *The City of Legends*



culture. Visitors are invited to take a walk on Water Street, the oldest street in North America, to experience Old World charm in a New World setting. St. John's best-known attraction is *Signal Hill National Historic Site*, where Marconi received the first trans-Atlantic wireless message in 1901.

Fredericton began as a French military encampment along the Saint John River and later, under the British, became one of the most important military sites between Halifax and Kingston. Last year, the two-block area that was once a bustling British Army Garrison was renamed the *Historic Garrison District*.

By focusing on its strengths — history, culture and geographic location — and by packaging itself as a safe, clean and hospitable “European” city in the heart of North America, Québec City is successfully drawing visitors from Canada and the United States throughout the year.

Québec's International Military Music Festival, which draws well

over 100,000 people each August, focuses on an often-overlooked tradition of military music, which has been an integral part of the city's artistic and cultural heritage for over 300 years. The imposing Citadel, the largest fortification in North America still occupied by regular troops, is the perfect backdrop for festival's free public concerts, featuring the Citadel's resident Royal 22nd Regiment marching band and visiting bands from Europe and the United States.

In Alberta, Fort Edmonton Park, which opened its doors almost 30 years ago, has become Canada's largest historical park with more than 70 period buildings set in four distinct eras of Edmonton's history: 1846 (Hudson's Bay fur trading post), 1885 (a small settlement prior to gold rush), 1905 (bustling capital city), and the 1920s. More than 200,000 visitors a year join the costumed historical interpreters for a unique walk through history. 

This article was prepared with the assistance of the National Capital Commission (www.capcan.ca).

Capital Anniversaries

2003

- Regina marks its 100th anniversary on June 19, 2003 with a Royal visit from Prince Edward, the Earl of Wessex, and Sophie, Countess of Wessex.
- 175th anniversary of the *St. John's Rowing Regatta* (now the Royal St. John's Regatta), the oldest uninterrupted sporting event in North America.
- 100th anniversary of the founding of the *Orchestre symphonique de Québec*.
- 50th anniversary of Queen Elizabeth II bestowing the title “Royal” on the Winnipeg Ballet.
- 50th anniversary of *Whitehorse* being named capital of Yukon.

2004

- 125th anniversary of the *Canadian National Exhibition*, Toronto.
- 100th anniversary of *Butchart Gardens*, Victoria's number one paid tourist attraction.
- 100th anniversary of *Edmonton*.

2005

- 100th anniversary of Saskatchewan.
- 100th anniversary of Alberta.
- 60th anniversary of the end of the Second World War and 125th anniversary of the Canadian War Museum (coinciding with the grand opening of the new Canadian War Museum in Ottawa in 2005).

www.cccco-occ.ca

The Canadian Capital Cities Organization is a forum for capital city representatives who wish to work together to increase the significance of Canadian capital cities in order to reflect the pride, unity, history, democratic traditions and aspirations of the people living in the provinces and territories of Canada.

Learn more about each Canadian capital by visiting the following websites:



Canadian Capital Cities Organization
Linking Canada's Capitals

- www.city.iqaluit.nu.ca
- www.city.whitehorse.yk.ca
- www.city.yellowknife.nt.ca
- www.tourismvictoria.com
- www.tourism.ede.org
- www.tourismregina.com
- www.tourism.winnipeg.mb.ca
- www.torontotourism.com
- www.canadascapital.gc.ca
- www.quebecregion.com
- www.fredericton.ca
- www.halifaxinfo.com
- www.visitcharlottetown.com
- www.stjohns.ca

Spring: easy to love, hard to understand

Spring is a shoulder season anywhere you go in Canada, but it's also a relative term! As southwestern British Columbia and Southern Ontario approach full-bloom, the last of the snowpack

in most other parts of the country has yet to melt. As our southern rivers shed their final ice floes, the North (which by southern standards doesn't enjoy spring until summer!) is nonetheless

rejoicing at the return of daylight. In spring, all across Canada something unique is happening!

Getting a handle on spring from a tourism perspective is remarkably difficult. Certainly it is seen by few as a target season. For meteorologists, however, the moods of spring are easy to understand: "Spring, generally speaking, is warmer now than it has been in the past," says David Phillips, senior climatologist with Environment Canada. "And that trend will continue."

Spring, of course, offers a number of specialty activities such as sugar bush outings in Ontario, Quebec and parts of the Maritimes, as well as some of the best spring skiing opportunities in the world! An ever-growing number of learning vacations with a spring focus are becoming available as well. Ontario, Quebec, Alberta and B.C. are the four most popular provinces to visit in Canada in the springtime.

It is Canada's cities that see the most significant levels of spring tourism activity. With the kids still in school, Canadian and American couples are heading to Canadian cities for shorter, weekend getaway-style vacations. "The focus of the "sell" in the U.S. market is based on experiential travel," says Susan Iris, managing director for U.S. markets with the Canadian Tourism Commission (CTC). "Consequently, there are a wide variety of travel experiences we promote in the spring months ranging from ski, to city, to spa, to getaways that include touring, culture and cuisine."

"For a majority of American tourists," Iris continues, "specific products comprise one component of their vacation, so we must speak to a variety of interests. For example, a spring vacation may consist of theatre tickets, shopping, and fine dining while taking in a museum. Americans who prefer a "foreign non-warm" vacation such as Europe present a strong marketing opportunity to switch to a Canadian vacation," says Iris. In addition to weekend getaways,

Canada's cities also enjoy a slight increase in business travel in the spring. Many organizations hold annual conferences and general meetings at this time as employee vacations are often staggered across the busy summer months. But, overseas visitors to Canada come to play! For every overseas business visitor Canada receives in the spring, roughly five visitors arrive on holiday!

March, April and May are also the traditional wrap-up months for many of this country's "winter" sport activities such as hockey, basketball and volleyball. For example, the Ontario Basketball Association has nearly 1,000 teams participating in provincial championships during these months. While most of this activity involves domestic travel, it still contributes significantly to tourism spending.

And, of all the products Canada has to offer in the spring, few are more eagerly anticipated than the arrival of golf season. By winter's end, players everywhere are anxious to hit the links, and the Canadian Golf Tourism Alliance recognizes that spring golf is a hot market in some regions of the country.

The Alliance has launched a new e-commerce marketing program that includes partnerships with three of the strongest Web sites in the golf business. Under a new marketing partnership, *GOLFONLINE.com* and *TravelGolf.com* will soon feature strong links to the CGTA's Web site, *Canadagolf.com*, along with golf stories and sales packages targeted at the huge U.S. golf market. In addition, *GolfSwitch.com* will make real-time tee times readily available to golfers.

With everything thawing out and going green, from forests to fairways, spring is an exciting time of year. Anything so special, and so universally appealing, should be easy to package and sell... but it's not. Perhaps it's just too, well... personal! *



Promoting spring

Since gardening and spring seem to be so closely tied, TOURISM asked one of Canada's high-profile garden managers to comment on how well Canada is positioned as a spring tourism destination, and what further work needs to be done to move things forward. Roger Wheelock, CEO of Ontario's Royal Botanical Gardens, spent two years as chief operating officer of the Canadian Tourism Commission (CTC), was chairman of the CTC's industry product development committee, and had spent many years at the well-known Butchart Gardens in Victoria.

Wheelock acknowledges that it is difficult to promote spring in Canada. "Creating a four-season destination remains a challenge, especially in uncertain economic times like these, when marketing dollars coalesce back to the mainstream as we try to keep beds full and turnstiles revolving," says Wheelock. "However, we must keep our eyes on the far horizons as well, continuing – perhaps redoubling – our efforts at product development."

"The trouble with product development has always been inconsistent effort, and that's understandable," says Wheelock. "It's riskier than marketing existing product, but if we get it right, we will have a more sustainable industry and perhaps we can move one more notch up the World Tourism Organization's ladder of international arrivals and international receipts. Number 9 can't be good enough!"

Wheelock stresses the need to create and package more slow-season product, and is gratified to see the initiatives being taken by some of the provinces and cities. "We should agree, however, our national fixation with marketing based on our political geographic units rather than our "experiences," he comments. "If we are truly to claim to be "market-led", but that's a subject for another occasion!"

"I believe Bob deMoor, the CTC's original vice-chairman, was right when he said "if you always do what you've always done, you'll always get what you've always had! We have to get away from simply ramping-up in spring, running like hell all summer, and ramping-down in autumn (or the reverse if you're a ski destination)," says Wheelock. "Otherwise, we're going to remain a two-season country: Skiing and Patio. *

Product Clubs

Strong winds & tall-tales

Long loved for their soft, zephyr-like winds that sigh in the pine branches west of Calgary and melt the ice and snow in a matter of hours, chinooks are usually a welcome occurrence in Alberta. But, did you know they also have a violent side?

While exploring the Peace River district in the Rocky Mountains in 1793, Alexander Mackenzie was overtaken by a wind he described in his journal as "a perfect hurricane." The wind was most certainly that of a chinook as Mackenzie's description makes clear: "...a rumbling noise was heard in the air like distant thunder, when the sky cleared away in the southwest; from whence there blew a perfect hurricane, which lasted till eight. Soon after it commenced, the atmosphere became so warm that it dissolved all the snow on the ground."

Chinook winds have been known to reach speeds upwards of 150 kilometres an hour and to arrive with such fury that they've become the source of more than one Alberta tall-tale. These include:

- the chinook that overtook a Calgary-bound bobsleigh with such speed it the driver had to whip his horses into a gallop just to keep the front-runners out of the mud and on the snow. According to local history, no matter how fast the horses' gallop, it could not pull them ahead of the rapidly advancing mud!
- the chinook that pinned a dog against a barn wall for so long it starved to death.

Trans Canada Trail

Alberta

Population 3,113,586
Area 661,190 km²

TCT

- on solid ground 2,100 km
- by water 700 km

Edmonton is Alberta's capital and the nation's most northern major city. The perpetual flame at the Alberta Legislature pays homage to the province's natural gas resources. 

Photo: John de Vosse; courtesy of the Trans Canada Trail Foundation

Spring's harvests

Although most Canadians start working on their gardens in May, horticultural tourism generally begins later, especially in eastern Canada. To develop new business, the Gardens and Green Spaces Product Club is pursuing efforts to market Quebec's gardens and green spaces, with a focus on promoting visits early and late in the garden season.

One event becoming well-known in Quebec is the Montréal Botanical Garden's *Great Gardening Weekend*. An early season magnet for amateur gardeners and horticultural tourists alike, the sixth annual edition this year is scheduled for May 22 to 25. For those four days, the Botanical Garden will be transformed into a giant horticultural fair where growers, craftspeople, horticultural school representatives, florists, Botanical Garden experts and green-thumbed visitors all mingle in onsite marquee tents. 

For more information: www.ville.montreal.qc.ca/jardin.

Horticultural tourism

According to the proponents of the product club, 52 million North Americans have declared an interest in Horticultural Tourism. In response, the Garden Inspired Tourism Product Club (GI Tourism) is offering the travel trade special opportunities in British Columbia.

Last year, GI Tourism pioneered new levels of partnership, with 200 participants, stakeholders and partners contributing together to the successful launch of the product club's new Web site. A trip to the site reveals why the word "Inspired" appears in the product club name. Respecting the interests of today's travellers, "Garden Interest" is combined with other areas like cuisine, arts, culture and heritage, wineries, spas and even agri-tourism to form a well-rounded and full travel experience. 

For more information: www.GardenInspiredTourism.org.

Bloom and garden tours

The Bloom and Garden Tours Product Club is in the final stages of development and now has a variety of horticultural tours ready for the market. Arranged in partnership with Tours Chanteclerc and Travelinx (Canada Travel), the tours are designed for gardening enthusiasts.

An inventory of the possibilities yielded many worthwhile private and public gardens. The resultant product is made up of itineraries that take in gardens and green spaces in municipalities that have won awards in the Communities in Bloom competition.

Pilot projects for the product club demonstrated there is interest among gardening buffs for visiting gardens. The advertisements that generated the most interest appeared in gardening magazines, while short visits were the most requested. The research also showed that visitors, and by extension tour operators, particularly appreciate garden visits as a complement to cultural or outdoor tours. 

For more information: juliedespatis@cib-cef.com.



The Research Viewpoint

TAMS studies useful for North American market

One of the tools in the research tool kit was covered in last month's issue of *TOURISM*, in the story *Travel Activities and Motivations: An Overview*, with results from the latest segmentation analysis of the North American market.

Those familiar with Canadian Tourism Commission research know that we carry out many surveys. The Travel Activity and Motivation Survey (TAMS) was begun as part of the expansion of tourism research in the mid-1980s. This was after the National Task Force on Tourism Data, when we in Canada really began to take a comprehensive, systematic approach to studying tourism. Because we have found stability in the results from TAMS, we only need to undertake it once every few years and have done it three times in the past 20 years.

What we get with TAMS is a clearer portrait of market segments than we may get with other surveys, with links between attitudes and behaviours. This portrait is therefore very useful for tourism businesses. With TAMS we have detailed information on activities carried out on visitors' trips, the media they are exposed to, as well as the sort of non-travel activities they are also likely to partake in, in addition to their identified reason for travelling. Their attitudes – toward travelling in general, their destination and toward Canada – are linked to their age and their stage in the consumer experience cycle with the travel product.

TAMS is designed for mature consumer markets such as we have in North America. It is not designed for emerging markets, such as Mexico and China, and we would not learn much from trying to run this type of study in these countries.

U.S. business travellers

Commentary on the outlook of American business travel has been negative over the past year, but recently released figures point to an upturn in business travel.

Preliminary third quarter 2002 Statistics Canada numbers were released at the end of February showing that for the second straight quarter, business travel from the U.S. to Canada increased over the same period in 2001. Even more impressive are the spending levels: the highest on record, at \$507.4 million (up 15 percent).

Spending on all aspects of business trips was up from the third quarter of 2001. An increase in such high-yield activities as shopping and golfing and other non-business related activities contributed to increased levels of spending overall. This is particularly promising news as recent research has suggested the financial benefits of marketing leisure activities and trip extensions to business

travellers, who will then be more likely to become repeat leisure travellers to Canada.

While U.S. business travellers account for a much smaller proportion of trips to Canada than leisure, their substantially higher spending levels make them an extremely lucrative market. The Canadian Tourism Commission's MC&IT team works to attract these travellers by marketing Canada's attributes as a meeting, convention and incentive travel destination.

Despite disappointing first quarter results, the rebound in the second and third quarters means that overall spending was up 3.4 percent over the same three quarters of 2001 and up marginally over 2000 levels as well. Whether this growth has continued since the third quarter remains to be seen. 

For more information:
www.canadatourism.com

What we have learned with TAMS is that the relationships between demographic groups and travel attitudes are fairly stable. One fascinating detail we have unearthed, is that people's attitudes toward tourism destinations tend to be formed as part of their early travel experiences – between 18 and 25 or so in North America – and remain stable for the rest of their lives. At least for travellers, first impressions count!

This has allowed us to do two new and innovative things with the most recent TAMS. One is to project our numbers forward to 2025, using demographic data on market growth to forecast what the market will look like over the next 20 years. While it may not happen tomorrow, with TAMS we can see how one day people may not automatically think of ski hills when contemplating a vacation in Canada, but visualize a more diversified getaway, much of it indoors.

The other is to apply the same survey model across North America, in order to uncover similarities and differences between what have traditionally been thought of as the different markets of Canada and the U.S.

TAMS is well-received by our marketers, particularly those involved in market development. With the TAMS report as part of their foundation, they can design a marketing campaign across the continent with more bang for its buck, and design products which they know in advance the consumers targeted will likely react to favourably. A useful tool indeed! 

War impact scenarios

Uncertainty created by the conflict in Iraq has led the World Travel & Tourism Council (WTTC) to produce two sets of research to more fully explain potential outcomes. WTTC has identified a base case scenario in which there is a diplomatic solution or victory after a short, contained war, and a second, focused on the more devastating impact of a prolonged war.

The WTTC research, demonstrated the importance of travel and tourism to the world economy when the direct and indirect economic

impacts of the industry are assessed. Under the base case scenario it is estimated the industry will, in 2003, account for 195 million of the world's jobs or 7.6 percent of total employment, and 10.2 percent of total GDP.

WTTC analysts point out that a prolonged war in Iraq could destroy more than three million jobs in the global travel and tourism industry. 

For more information:
www.wttc.org

In light of the crisis in Iraq, the Canadian Tourism Commission (CTC), as the national marketing agency, is working with the provinces, territories and the industry to mitigate the effects and impact on our industry. The CTC has also undertaken to monitor and assess the immediate and long-term impacts of the crisis. Its various offices around the world will provide weekly and monthly impact statements. For more details on the CTC initiatives and for information on how the market and industry are responding, visit the Commission's website at:

<http://www.canadatourism.com> 



Visual Arts

Demand for culturally based tourism products and experiences has grown worldwide and Canada is no exception. Visual Arts tourists are an important group to learn about, particularly due to their overlap with other key segments. This growing market is profiled in two new TAMS (Travel Activities and Motivation Survey) reports.

In order to qualify as a **Visual Arts Enthusiast**, travellers must have visited two of the following: art galleries; international film festivals; local arts & crafts studio (shopping or browsing). Some key findings from the Visual Arts reports:

- The Visual Arts Enthusiasts market (those with recent leisure travel experience in Canada) is appreciably larger in the U.S. (7.0 million) than it is in Canada (1.7 million).
- It represents the third largest group of travellers to Canada from the U.S. and the fifth largest among domestic travellers.
- Two in three (66 percent) of Canadian Performing Arts Enthusiasts are also Visual Arts Enthusiasts – this overlap was even more pronounced among Americans (77 percent), suggesting strong packaging potential.
- Canadian Visual Arts Enthusiasts were over-represented in Ontario (particularly in Toronto) and B.C. and under-represented among residents of Quebec and Atlantic Canada. Quebec, however, attracts a disproportionate number of domestic Visual Arts Enthusiasts, relative to its population.
- Visual Arts Enthusiasts who travelled to Canada were also more likely to live in mid-tier states than the American adult population as a whole. While total travellers to Canada are substantially under-represented in U.S. long haul states (tier 3), Visual Arts Enthusiasts were more likely than most other segments to come from tier 3 southern states. 41 percent of these travellers came from southern states, compared to the average 35 percent among travellers to Canada.
- While Ontario captured the highest proportion of these travellers, American Visual Arts Enthusiasts were disproportionately more likely than other travellers to have visited Atlantic Canada, Quebec or British Columbia.
- The U.S. and Europe represent strong competition for Visual Arts Enthusiasts. Sun/sea destinations represent competition for domestic Visual Arts Enthusiasts.
- Demographic variations existed between American and Canadian Visual Arts Enthusiasts. While the culturally-oriented American TAMS segment populations were all fairly distributed by gender and Visual Arts Enthusiasts were no exception, there was a strong variation in gender among domestic travellers. 63 percent of Canadian Visual Arts Enthusiasts were female and only 37 percent were male. Visual Arts Enthusiasts had higher than average incomes and education.
- 74 percent of Canadian and 75 percent of American Visual Arts Enthusiasts lived in adult-only households, compared to the averages of 65 percent and 71 percent respectively, of recent leisure travellers within—and to—Canada.
- A somewhat higher proportion of Canadian Visual Arts Enthusiasts were born outside of Canada (19 percent) than was the case within the general domestic travelling population.
- The visual arts markets in Canada and the U.S. are both expected to grow at rates faster than average over the next 25 years, due to an ageing population in both countries and increasing immigration to Canada. Since older travellers and new Canadians have the tendency to participate in more culturally-oriented activities, all of the cultural activity-based segments featured in the TAMS analysis are expected to experience particularly strong levels of growth. *

For more information: www.canadatourism.com.

A MONTHLY GUIDE TO TRAVEL AND TOURISM DATA

TOURISM ACTIVITY	REFERENCE PERIOD	QUANTITY	% CHANGE FROM PREVIOUS YEAR
TOURISTS TO CANADA			
From the U.S.	January 2003	651,951	6.8
By Auto	January 2003	411,076	10.5
By Non-auto	January 2003	240,875	1.0
From Overseas - Total	January 2003	181,645	11.6
United Kingdom	January 2003	35,802	11.6
Japan	January 2003	15,906	10.0
France	January 2003	15,626	12.2
Germany	January 2003	9,879	10.8
Hong Kong	January 2003	7,558	40.5
Australia	January 2003	14,142	35.9
Taiwan	January 2003	5,064	-0.7
Mexico	January 2003	7,196	37.6
Korea (South)	January 2003	10,409	10.5
OUTBOUND CANADIAN TOURISTS			
To the U.S.	January 2003	863,767	4.8
By Auto	January 2003	415,389	1.2
By Non-Auto	January 2003	448,378	8.3
To Overseas - Total	January 2003	581,330	17.9
EMPLOYMENT IN TOURISM			
Total Activities	Fourth Quarter, 2002	579,000	2.3
Accommodation	Fourth Quarter, 2002	135,000	0.4
Food and Beverage	Fourth Quarter, 2002	140,000	2.2
Transportation	Fourth Quarter, 2002	81,600	5.0
SELECTED ECONOMIC INDICATORS			
Personal Disposable Income per person (\$)	Fourth Quarter, 2002	\$22,411	0.8
GDP at market prices (current, \$ billion)	Fourth Quarter, 2002	1,170.9	1.6
GDP chained (1997, \$ billion)	Fourth Quarter, 2002	1,076.9	0.4
CPI (1992=100)	January 2003	121.4	4.5
EXCHANGE RATES (IN CDNS\$)			
American dollar	February 2003	1.5123	-5.2
British pound	February 2003	2.4315	7.1
Japanese yen	February 2003	0.0127	6.7
EURO	February 2003	1.6308	17.4

Note: All tourist estimates deal with trips of one or more nights; All data on this table is not seasonally adjusted.

Sources: Statistics Canada and the Bank of Canada.

Reacting to crisis

Before the war, and even now that it's begun, tourism suppliers have been preparing their game plan. The companies in a better position to face growing uncertainty are the ones that quickly initiated new plays after 9/11, when it became clear that survival, rather than profitability, was the more realistic outlook.

During the past year, some tourism suppliers recovered quickly because they put in place the infrastructure and products that suited changing consumer preferences and travel patterns. On the other hand, for companies whose hands were tied or

which were slow to react, the short-term outlook remains uncertain.

Timing and solid business fundamentals have come together for some suppliers, like low cost airlines and on-line travel service providers. In fact, these segments appear to represent some of the strongest players in the tourism industry, in the foreseeable future. *

For more information: CTC Tourism Intelligence Bulletin, issue 12, March 2003 at www.canadatourism.com.

The Yukon government has "taken steps immediately" towards the creation of a **Special Marketing Agency** for tourism, it announced at the end of February. The territorial government has also allocated resources toward a full-time tourism product development position and will work with industry on a branding and marketing strategy. In April, Yukon will also have a stand-alone Department of Tourism and Culture.

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The **Realstar Group** has become the Canadian master franchiser of Accor, one of the world's largest groups in hotels and services. Accor brands included in this venture are **Novotel**, **Studio 6** and **Motel 6**. In the first five years of this venture, Realstar's plan is to franchise 20 Novotel, 30 Motel 6 and 10 Studio 6 hotels in Canada. Realstar estimates the value of hotel development to be in excess of \$500 million over the five years; city-centre conversions and new construction will take place across Canada.

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The **Nova Scotia International Tattoo** in Halifax marks its 25th anniversary June 29 to July 30 this year. The event is billed as the world's largest annual indoor theatrical production, and contributed \$19.6 million to the Nova Scotia economy. Last year, 22,000 tourists attended, of whom 12,000 were influenced to come to the province by the event itself. Tourists spent an average of \$164 per day over an average 5-day stay in the Halifax area.

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The **Council of Tourism Associations** in B.C. (COTA) is undertaking a campaign to enhance the profile of the tourism industry within the province, as an important economic generator. The industry is putting together a three-year public relations plan which is expected to cost between \$900,000 and \$1.5 million, funded by COTA's constituents such as

Tourism Victoria, Tourism Vancouver and Tourism Whistler.

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The **Small Business Association of Banff** is concerned about Parks Canada plans to double commercial gate fees for tour companies visiting the mountain parks. The fee increases are being proposed to help pay for repairs to deteriorating park infrastructure, according to the association.

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According to a report in the Halifax Chronicle Herald, 16 percent more **cruise ships** are coming to the **Port of Halifax** this year. The manager of marketing and cruise development for the Halifax Port Authority has said the port has scheduled 101 vessel calls, and expects 178,000 passengers. Cruise vessel calls to the Port of Halifax have increased by 123 percent and passenger traffic by 419 per cent over the past seven years.

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It was a hit! "**Why Canada**", the e-mail-based campaign conducted by partners Hilton Canada, the Canadian Tourism Commission, and Air Canada, targeted U.S. meeting planners with four e-mails describing aspects of Canada that made it a good meeting destination.

Of the 3,600 e-mail recipients, 1,400 entered the contest, double the expected response.

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The Honourable **Judd Buchanan**, past chair of the Canadian Tourism Commission, was named the Tourism Industry Leader of the Year at the fourth annual British Columbia Tourism Awards in February.

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Winnipeg's **Place Louis Riel All-Suite Hotel** has achieved Gold Level Standing in Progressive Aboriginal Relations (PAR) rated by the Canadian Council for Aboriginal Business. The Place Louis Riel is the third company in Canada, following Syncrude and Cameco, to have achieved Gold Level Standing and the first company in Manitoba to complete the PAR process and receive Gold Level Achievement.

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The **Okanagan Wine Festivals Society** has announced a partnership with the **Dairy Farmers of Canada**. Dairy Farmers of Canada promotes the quality and variety of over a hundred types of Canadian cheese and feels that the opportunity to gain exposure to Okanagan

wine tourists will benefit the Canadian dairy industry. The two associations have formed a two-year alliance which will enable them to develop educational wine and cheese seminars at four annual festivals.

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A group named the **Convention Centres of Canada** (CCC) represents 17 convention centres from Victoria in the west to Halifax in the east, with a total of more than six million square feet of meeting and convention space. The CCC will focus on the enhancement of facility and service quality, the development of a more strategic approach to marketing Canadian convention centres in key markets, and strengthening the role convention centres play in the overall economy.

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The **National Tour Association** (NTA) has initiated a multi-faceted program in support of member destination marketing organizations. The program also includes making research available and sending letters to all U.S. governors and **Canadian premiers** stressing the importance of the travel and tourism industry to their destinations' revenue. The NTA is an organization of nearly 4,000 tourism professionals representing the packaged travel industry.

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Canada's thriving golf industry and its tourism partners will invest \$1.5 million in their 2003 golf marketing program again this year under the banner of the **Canadian Golf Tourism Alliance**, with its recognizable Canadagolf brand. New this year are a Canadagolf Guide (targeted to 500,000 readers of the *Globe and Mail's Report on Business*), *Golf Canada* magazines, and television ads on the *Golf Channel*. The CGTA also has a presence in the CTC's new consumer magazine, *Pure Canada*. 



The Glenbow Museum in Calgary invites visitors to embark on an authentic northern experience of Inuit life and culture. *Inuit: Our Way of Life* tells of survival and innovation, the story of the people and cultures of the Arctic. The exhibition opens June 14 and runs until September 21, 2003.



Richard Payette has been appointed regional vice-president for the Quebec region of Fairmont Hotels and Resorts, in addition to his responsibilities as general manager for the Fairmont Queen Elizabeth in Montréal.

Tom Penney, vice-president of planning for the Canadian Tourism Commission (CTC), has seen his role expanded to include product development, with responsibility for product line specialists, the product club program, and Rendez-vous Canada.

Sally Nomura has been promoted to the position of manager, conference services and catering at The Fairmont Hotel Vancouver. She has been with Fairmont hotels in Vancouver since 1995 when she started as a front desk agent.

Ann Vachon has joined the CTC's Europe and Latin America Group. She has 10 years experience in the tourism industry, with the last four years as sales and market development manager with Tourism Vancouver.

The Toronto's Westside Tourism Council has announced **Walter Galvao** as the organization's new chair, and **Ralph Schwengers** as co-chair.

Brian Coburn has been appointed Minister of Tourism and Recreation for the Province of Ontario.

William Allen has been named Ontario's Deputy Minister of Tourism and Recreation. Allen most recently served as the Deputy Minister of Citizenship.

Gary Norris has been named Deputy Minister of Tourism for the Province of Newfoundland and Labrador. Norris was previously Deputy Minister of Intergovernmental Affairs.

Peter Bruyere has been appointed sales manager at the Fairmont Hotel Vancouver; he was recently with the Four Seasons hotel in that city.

Francis Parkinson has been named general manager of The Fairmont Waterfront. He began his career at The Fairmont Banff Springs in 1971 and has been with the hotel group at locations in western Canada ever since.

Tim Aubrey has been named Fairmont's new senior vice-president, finance. Also taking on new roles at Fairmont will be **Vineet Gupta**, vice-president, technology, and **Brian McDonald**, vice-president & controller.

Adine Béraud and **Caroline Lévesque** have joined the CTC communications team as French translators and editors. Both have an extensive experience in translation in the private and public sectors.

Sylvia Priestley-Brown has joined the Tourism Industry Association of New Brunswick as special projects and events co-ordinator. She formerly held similar positions with the New Brunswick Arts Board and the provincial museum association.

CHIP Hospitality has recognized **Steve Vallewand**, general manager of the Regina Inn and Conference

Centre, as one of its top performers with the General Manager of the Year award.

Kieran MacDonald has been appointed General Manager of The Fairmont Scottsdale Princess hotel in Arizona. MacDonald returns there after a four-year stint with The Fairmont Waterfront in Vancouver. 



Tourism Profile

Bruce MacMillan

To keep our readers informed about key decision-makers in Canada's tourism industry, *TOURISM* is introducing members of the Canadian tourism industry. Each profile highlights the personal vision of these industry leaders as they voice their opinions on important issues facing the tourism sector.



Bruce MacMillan has been appointed to head up Tourism Toronto, the tourism-marketing arm of Canada's largest city. Born in Vancouver, MacMillan received a Bachelor of Commerce degree from the University of B.C. and is a chartered accountant. He has worked in international financial management consulting and special events, and served 11 years as vice president, sales and market development for Tourism Vancouver, including a secondment to the Vancouver Whistler 2010 Bid Society.

Before joining Tourism Toronto, MacMillan was vice president of marketing and digital services for Meeting Professionals International in Dallas, where he was responsible for developing and implementing MPI's innovative digital marketing strategy and business partnership.

MacMillan sees an evolution of Canada's brand beyond amazing natural outdoor experiences to an acceptance of our country as a multicultural montage of humanity, saying that people now want to check out our cities as much as our parks and wilderness. He feels Toronto is Canada's ultimate manifestation of that experience, and that the Canadian Tourism Commission (CTC) can play a big role by continuing with the evolution of the Canadian brand culture.

"Let's not just architect our brand around what we have, but also around the 'need' our visitors want to have filled, whether it's aboriginal experiences, conventions or spa adventures," says MacMillan. "These needs are changing, and while we'll always have unsurpassed scenery, we have so much to offer in our communities."

He is looking to the CTC for innovative leadership, expecting that it can be a catalyst for "remarkable new ideas in Canada's tourism industry." MacMillan stresses, "what worked in the tourism industry five years ago or maybe even five weeks ago is not likely to work today and it certainly won't work tomorrow. Everything about our industry has changed." 

President and CEO Canadian Tourism Commission (CTC)

The President and Chief Executive Officer of the CTC will provide corporate leadership in defining and implementing the Commission's strategic vision, and will ensure that the CTC's mandate integrates Canada's broad policy direction for economic development and trends pertaining to the tourism industry. The new President will also lead the overall operation of the Commission and manage national and international programs and initiatives to promote Canada as the four-season tourist destination.

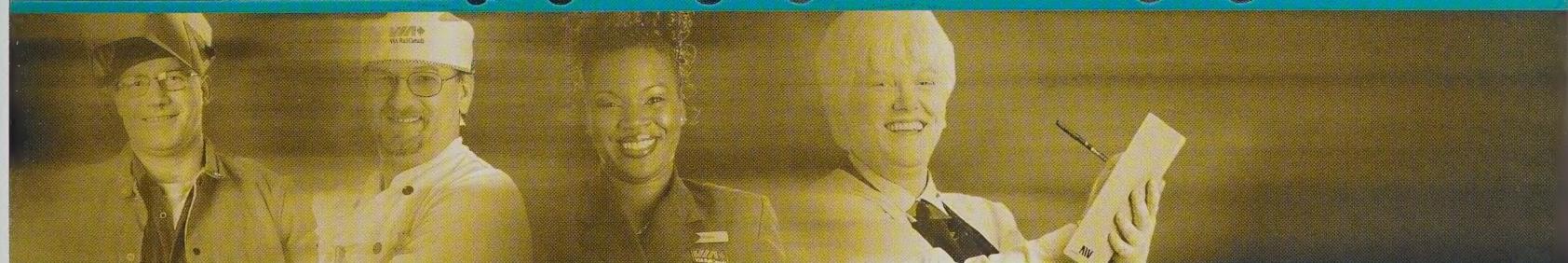
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Change of address, cancellation, subscription...Fax: 613-946-2843
If undeliverable return to: Canadian Tourism Commission,
55 Metcalfe St., Suite 600, Ottawa ON K1P 6L5.
Publication Agreement #40659111.

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